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### CIRCULATE THAT REVIEW!

As in other management improvement programs, records management is not a one-man or one-staff operation. Improvement in paperwork can be effected only with full participation and cooperation at all levels of supervision. Material in the **RECORDS MANAGEMENT REVIEW** is not directed solely to O & M Examiners or top management; it is prepared and presented in such a way as to be understandable and valuable to all concerned in paperwork improvement. Requests for the **REVIEW** have been received from many supervisors who report that the publication does not get routed to them. Circulating the **REVIEW** among all key supervisors will result in an increased appreciation of what management staffs are trying to accomplish in this field, and thus aid in better coordination of the endeavors of line and staff.

### FORMS AND REPORTS MANAGEMENT

#### *Sixth Naval District Forms and Procedures Survey*

A joint forms and procedures survey was conducted by the Sixth Naval District DRMO and DPPO at the request of the Naval Receiving Station, Charleston, S. C. Recommendations were made for the elimination of 67 local forms, the replacement of 15 local forms by Department or Standard forms, and the improvement or standardization of 76 activity forms. The Receiving station has begun to implement at least 90 percent of the recommendations.

In addition to the overall accomplishment, the survey illustrates the application of a variety of effective management techniques which can be used to curtail unnecessary paperwork and procedures in connection with forms. Although action must be taken on the basis of conditions in each individual situation, the basic principles applied at Charleston may serve as a basis for similar action in other activities.

▲ **Technique: The substitution of one standard form for a variety of separate local forms being used to accomplish a single purpose.** For example, it was found that sixteen different local forms were being used regularly on the station for requesting and transferring records. It was recommended that the District General Form already available (6ND GEN. Form 107, Transfer of Records) be substituted. This not only saves the labor and material previously expended in cutting the stencils and reproducing and stocking the several forms, but results in man-hour savings through simplified standard procedures for transferring records. A further example: Two different mimeographed forms were being used for "assignment" and "check-in" data on military personnel. The data on the forms duplicated that already available on the NavPers Form 500, Personnel Accounting Card, prescribed by NavPers 15,642 (Rev. 1951) for maintaining local (enlisted) personnel records. Space is available on the card for entering any necessary extra items which are not captioned. Substitution of the Bureau-prescribed record was recommended.

▲ **Technique: "Logs or Forms—not both."**—In some cases a log or record can be eliminated by using information on copies of an already existing form containing substantially the same data. The existence

of overlapping logs and forms was discovered in several instances; for example, a log was being maintained in the Warden's Office on both "in" and "out" mail concerning any prisoner. In addition, NavPers Form 1384, Mail and Visiting List, was being prepared for each prisoner. The form contained similar information, and also served, in effect, as a log on mail and visits. It was recommended that the local log be discontinued and the copies of NavPers Form 1384 consulted when necessary.

▲ **Technique: Form Letters:** *In many cases the use of a form letter will eliminate the necessity for typing individual letters.* (In this survey, recommendation was made for the standardization and printing of nine form letters to be used by the Transient Personnel Department. Note also the item on OSO, Mechanicsburg, form letters, in this issue.) **Conversely, however, the preparation of an individual letter may sometimes be less expensive than the use of a form letter.** For example, it was recommended that a mimeographed form letter ("orders to transfer for a normal tour of shore duty") be discontinued, and individual letters be typed on Receiving Station letterhead stationery as required; the format of the form letter required so many operations to complete the fill-ins that it appeared that little, if any, labor was saved through its use. It was estimated that only about two sets of the form letter were used per month; therefore, the preparation of a stencil, running off a supply and stocking it, were not considered justified. The use of an individual letter also assures neater copy, proper registration of carbon copies, and the use of manifold paper for the required six carbon copies.

► **Technique: Revise procedures and design of form, to facilitate operations.** It was found that considerable time was expended in the Clothing Small Store in consulting price lists and questioning customers, in order to complete the forms showing prices, sizes and quantities of items purchased. It was recommended that the form for requesting clothing be revised to have the current prices printed on the form and reprints made when a major price revision is received. (At the present time, the mimeographed price list is published each time a major price revision is effected. These usually occur semiannually.) Under the revised procedure, the forms would be placed outside the counter, and the customer himself would enter the quantity and sizes of the items desired. This would not only cut down the clerical operations previously performed, but would also enable the customer to know the amount

of his purchases, thereby eliminating the necessity for returning articles to the shelves whenever the customer found he would be overexpending his funds. This procedure would simplify the clerical operations performed by the storekeeper, and would expedite the handling of each customer, by eliminating congested conditions frequently occurring.

### **OSO Supply Letter, Mechanicsburg**

The Ordnance Supply Office, Mechanicsburg, Pa., designed a form letter (4ND-OSO-4894) to replace individually typed speedletters for inquiries on supply actions. It is handwritten by the distribution clerks who formerly drafted the speedletters. The address is written in by hand, and the applicable phrases are marked by a check (x) in the adjacent "ballotboxes." Man-hours spent in preparing correspondence concerning supply actions have been reduced from an estimated 108,000 man-hours to 104,000 man-hours per year. The labor savings is estimated at \$7,000 per year, and material costs have been reduced from an estimated \$1,325 to \$410, with total savings from using the new form estimated at \$7,914 per year. In addition, information requests to the field, replies to inquiries, and material requests from the field are sent out in less time than under the former procedure. Additional economies not readily measurable result from savings in file space and file clerks' time by eliminating two file copies of the speedletters. The total number of separate pieces of correspondence for which 4ND-OSO-4894 will be used is estimated at approximately 26,000 per year.

### **One-third of Naval Magazine Reports Eliminated**

As a result of a station-wide review, the Naval Magazine, Port Chicago, eliminated 95 of the 280 reports required by the station. Over 10,000 man-hours formerly required to prepare the reports are now available for other work. The cost of the station to make the review: 100 man-hours.

The review was made as a result of an initial reports inventory conducted to establish a continuing reports management program at the Magazine. The inventory disclosed that the station was requiring 280 reports, a figure which the Commanding Officer believed was at variance with the size and mission of the Magazine. The following procedure was used in making the review: The Reports Committee, with the Executive Officer acting as Chairman, met with the Heads of Departments. It was established that

each Department Head would have a collection made of all reports used within his Department, segregate them according to similarity of subject matter, scrutinize them for possible elimination or consolidation, and submit them, together with recommendations, to the Reports Control Committee. The Committee thereafter met personally with each Department Head and discussed their recommendations regarding the reports. This resulted in all obsolescent reports being marked for cancellation, consideration of the use of other procedures in lieu of certain reports, and recommendations for the consolidation of reports with similar content.

Two examples of the results of the review :

- An estimated saving of 2,080 man-hours, or \$3,120, resulted from the elimination of one of two duplicating reports. The report canceled was an "Ammunition Loading Report", showing tons handled, which was made out by Supercargo personnel at the piers and submitted to the Commanding Officer, the Executive Officer, the Public Works Officer, and the Supply and Fiscal Officer. Since comparable data were also available on the activity's "Daily Tonnage Report," the "Ammunition Loading Report" was eliminated.

- A daily inspection report, in duplicate, was made out by the explosive safety watch on approximately 15 ammunition-loaded off-station rail cars. One copy of this report was submitted to the Supply and Fiscal Officer. The report was also made out for about 20 intra-station cars. When any discrepancies were discovered, the report was forwarded to the Ordnance Officer for corrective action. Since a separate record was already being kept on "Explosive-Loaded Rail Cars for On-station Movements," the first inspection report was eliminated, with an estimated \$1,188 savings, or 792 man-hours.

It is believed that this survey shows outstandingly good results in terms of numbers of reports eliminated, and demonstrates an effective approach to a review of reports: i. e., working directly with individual Department heads in connection with their reports.

### **Telephone Exchange Reporting Curtailed**

As a part of a methods survey conducted in the Administrative Department, Naval Gun Factory, Washington, D. C., the procedures, functional relationships and record-keeping practices of the telephone exchange were studied. Approximately 3,100 annual man-hour savings resulted from eliminating

reports and the feeders and log necessary for their preparation. The savings were achieved by the following types of action :

- One action involved taking a calculated risk and eliminating logs and reports formerly maintained to substantiate final costs for outgoing telephone calls. For example, the "Telephone Exchange Outgoing Calls Report" feeders and worksheets were eliminated. Each operator had maintained a worksheet on which she entered the extension number from which the call was made, and the outside number called. These were typed in the Telephone Branch onto smooth 8- by 14-inch sheets, which were used as "feeders" to make up the "Telephone Exchange Outgoing Calls Report." The number of outgoing calls were totaled from the typed sheets and entered on the final report. Cancellation of the report eliminated not only the operators' time spent on maintaining the worksheets, but the typists' time in transcribing to smooth sheets, and the clerical and typing time in preparing the final report.

- A calculated risk was also taken in the case of a report furnished the head of the Telephone Exchange Branch on "Long Distance Authorization Numbers Used." ("Authorization numbers" were assigned serially by blocks to organizational units and used by them to identify long distance calls as officially authorized.) The report was used to help avoid possible misuse of authorization numbers (for example, use of the same number more than once). The report listed the extension number making the call, the location called, and the authorization number. In the future, the report will be eliminated, and the original PRNC GEN Form 51, "Long Distance Toll Call Authorization," on which the serial numbers will be printed, will be the official record.

- In another case, substitution of a mechanical counting device will eliminate written records. A procedure similar to the one described above for the outgoing calls was followed for personal calls made by the Naval Powder Factory, Indian Head, and the Naval Proving Grounds, Dahlgren. Both activities are served by the Naval Gun Factory switchboard. Data from the worksheets, showing the extension from which the call was made, and the number called, were typed on smooth sheets, and the final report of the total number of personal calls was compiled from the typed sheets. The total figure was needed to make collections from the two activities for personal calls. In lieu of the written record, a daily count will now be kept on a mechanical counting device and posted to a 3- by 5-inch card. Only a one-line entry for each day, and one card for

each station, is now required.

- Telephone exchange personnel reporting was also reduced. A weekly "Report of Telephone Operators Authorized to Work the Hours Shown" listed each operator's name, tag number, authorized hours worked, overtime worked and the date. A hand-written log with entries for each day of the week was maintained to prepare the report. The report was used to inform the Fiscal Department that regularly planned shifts involving night differential were scheduled. In lieu of the report, a copy of the District-General record, "Telephone Operators' Weekly Schedule," was substituted, as it shows essentially the same information, and, in any event, has to be prepared to establish work schedules and make them available to operators so they can plan work accordingly.

- In addition to the 3,100 man-hours savings in reporting, significant gains were made by the adoption of the "CLR System" (Continuous Lease Record System) for long-distance calls. Previous to the study, the Administrative Department had performed all the accounting and the auditing of bills. By arrangement with the Chesapeake & Potomac Telephone Co., the procedure has been completely changed, and the accounting is now performed by the Company. Under the new system, an original and a carbon toll ticket are prepared on each long-distance call. Once a day the originals are collected; they are sent to the Telephone Company the following morning. At the end of the month, the Telephone Company bill is checked against the carbon copies of the toll tickets, and payment is certified without further audit.

Other activities may find it profitable to review telephone reporting procedures and make appropriate changes.

## MICROFILM NEWS NOTES

### *Microfilming Services To Be Financed Under N. I. F.*

Effective 2 August 1953, the microfilming service function of the Naval Records Management Center, Alexandria, Va., became an operating responsibility of the Defense Printing Service, Washington, D. C. Simultaneously, the microfilming operations of the Naval Records Management Center, Garden City,

N. Y., were transferred to the District Publications and Printing Office, Third Naval District, and those of the Naval Records Management Center, San Bruno, Calif., were transferred to the District Publications and Printing Office, Twelfth Naval District.

The transfer of microfilming operations from the Records Management Program to the Printing Program provides Navy Industrial Fund financing for microfilm users. In the event of emergency or an increased requirement for microfilming services, the existing printing organization can be readily expanded. Procedural changes required under the new microfilming organization are relatively minor, and will be apparent to users largely in the use of general printing forms, rather than specific microfilm forms, and in monthly, instead of quarterly, billing for services.

### **"THE SMALLEST PRACTICAL SIZE ENVELOPE SHOULD ALWAYS BE USED"**

The above is a quotation from Chapter IV, page 39, of the Navy Correspondence Manual. For many years it has been the policy of the Secretary of the Navy that the use of large or extra-size envelopes should be avoided whenever possible. However, recent public criticism, generated by interest in economy in government operations, indicates that the practice is not always being followed. Reports have been received that some Naval activities are mailing separate one-page releases and other documents flat in large manila envelopes, instead of folded in smaller envelopes.

If all concerned include in cost consciousness procedures special emphasis on the consistent use of the smallest practical size envelopes, many hundreds of currently wasted dollars will be saved. In addition to the few cents saved in each instance on the envelope itself, heavy pieces of printed matter, books, etc., enclosed in large unfitting envelopes are likely to become damaged through the shifting of the contents during the course of ordinary handling. Also, distributing cases used in post offices are designed to accommodate regular letter-size mail, and there is considerable extra cost in handling matter which does not fit the standard compartments. Large pieces, or "flats" must be distributed in special cases and folded by clerks or carriers for delivery.

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